

Academic R&D – Reporting: Forms & Performance Reporting Periods

Applicable to the following Programs: Academic R&D Phase I, Academic R&D Phase II

Browser: Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

Summary

Annually, you will complete a Performance Reporting Period. (Two Performance Reporting Periods total, a mid-project update and at the end of the project.)

At the end of your project, you will also complete a final report form. After completion of your final report, you will submit your final payment request.

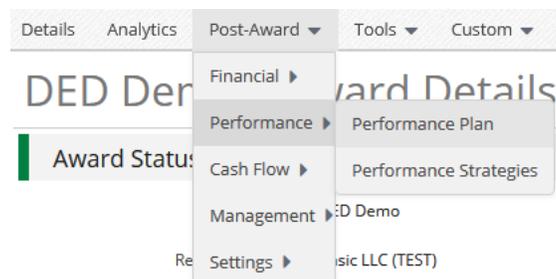


Performance Reporting Periods

Achievements

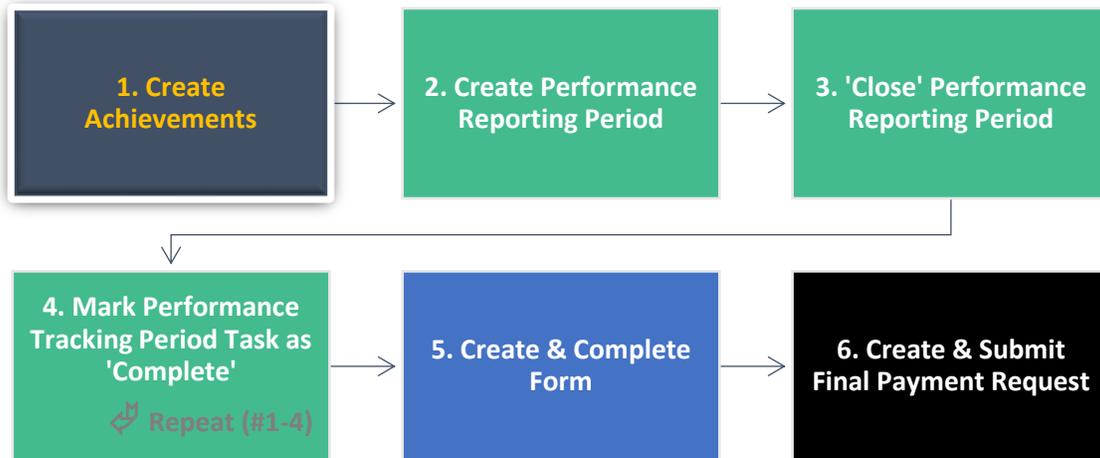
You will add achievements to each Performance Plan Goal. Achievements are how the progress of each goal is tracked.

Award Screen > Post-Award (tab) > Performance > Performance Plan



Click the green goal name to view more detail.

Creating Achievements



To create an achievement, click the Achievement icon next to the goal name.



Next click the + icon (top right) to add an **Achievement**.



For all achievements created, make sure the **Achievement Date** is within the Performance Reporting Period.

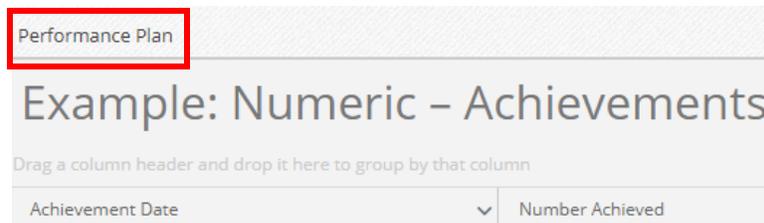
Complete the **Create Achievement** screen (additional instructions below) and click **Create**.

After creation, if you need to edit your achievement, click the **Pencil icon** next to the Achievement Date, edit the achievement and click **Save**.

If you need to delete your achievement, click the **Trash icon** next to the Achievement Date.



After creating an achievement, click **Performance Plan** at the top of your screen to view all goals again.



Narrative - Goal Types

Create Achievement

Grant	DED Demo
Goal Type	Narrative
Goal	Example: Narrative
Description	More information on the Narrative goal
Responsible Individual	John Doe
Achievement Date	<input type="text" value="3/11/2021"/> 
Question	How and what you should respond in the Answer field.
Answer*	<div style="border: 1px solid #ccc; height: 50px;"></div>
Complete	<input type="checkbox"/>
Notes	<div style="border: 1px solid #ccc; height: 50px;"></div>
Upload File(s)	 Choose file(s)

Create Cancel

Achievement Date: Date needs to be during the time period of the Reporting Period.

Answer: [Enter response based on the Question]

Complete – [Do not check this unless the Goal is done]

Notes: *Optional.*

Upload File(s): *Optional.*

Numeric - Goal Types

Create Achievement

Grant	DED Demo
Goal Type	Numeric
Goal	Example: Numeric
Description	More information on the Numeric goal
Responsible Individual	John Doe
Achievement Date	<input type="text" value="3/11/2021"/> 
Number to be Achieved	<input type="text" value="10"/>
Number Achieved	<input type="text" value="0"/>
Notes	<div style="border: 1px solid #ccc; height: 60px;"></div>
Upload File(s)	 <input type="button" value="Choose file(s)"/>

Achievement Date: Date needs to be during the time period of the Reporting Period.

Number Achieved: [Enter current number]

Notes: *Optional.*

Upload File(s): *Optional.*

Percent Achieved – Goal Types

Create Achievement

Grant	DED Demo
Goal Type	Percent Achieved
Goal	Example: Percent Achieved
Description	Increased to a desired percentage.
Responsible Individual	John Doe
Achievement Date	<input type="text" value="3/11/2021"/> 
Desired Percent	75.00 %
Total Possible	<input type="text" value="0.00"/>
Total Achieved	<input type="text" value="0.00"/>
Percent Achieved	
Notes	<div style="border: 1px solid #ccc; height: 60px;"></div>
Upload File(s)	 <input type="button" value="Choose file(s)"/>

Achievement Date: Date needs to be during the time period of the Reporting Period.

Total Possible: [Enter number, this is the denominator for the Percent Achieved]

Total Achieved: [Enter number, this is the numerator for the Percent Achieved]

Percent Achieved: Automatically calculates = Total Achieved / Total Possible.

Notes: *Optional.*

Upload File(s): *Optional.*

Percent Changed – Goal Types

Create Achievement

Grant	DED Demo
Goal Type	Percentage Changed
Goal	Example: Percentage Change
Description	Going from a current percentage to a desired percentage.
Responsible Individual	John Doe
Achievement Date	<input type="text" value="3/11/2021"/> 
Desired Percent	80.00 %
Total Possible	<input type="text" value="0.00"/>
Total Achieved	<input type="text" value="0.00"/>
Percent Achieved	
Notes	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>
Upload File(s)	 <input type="button" value="Choose file(s)"/>

Achievement Date: Date needs to be during the time period of the Reporting Period.

Total Possible: [Enter number, this is the denominator for the Percent Achieved]

Total Achieved: [Enter number, this is the numerator for the Percent Achieved]

Percent Achieved: Automatically calculates = Total Achieved / Total Possible

Notes: *Optional.*

Upload File(s): *Optional.*

Milestone - Goal Types

Create Achievement

Grant	DED Demo
Goal Type	Milestone
Goal	Example: Milestone
Description	More information on the Milestone goal
Responsible Individual	John Doe
Achievement Date	<input type="text" value="3/11/2021"/> 
Complete	<input type="checkbox"/>
Notes	<div style="border: 1px solid #ccc; height: 60px;"></div>
Upload File(s)	 Choose file(s)

Create
Cancel

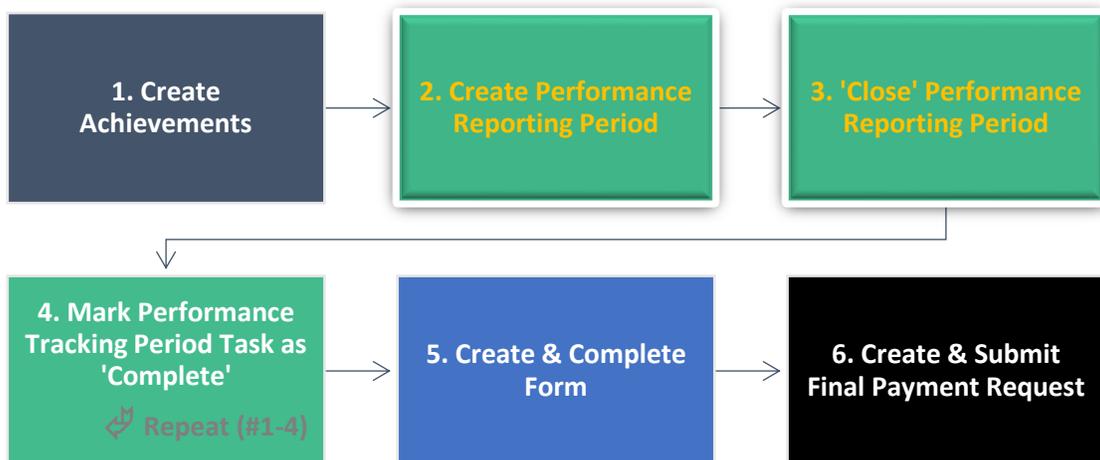
Achievement Date: Date needs to be during the time period of the Reporting Period.

Complete: [Do not check this unless the Goal is done]

Notes: [Enter progress description of milestone]

Upload File(s): *Optional.*

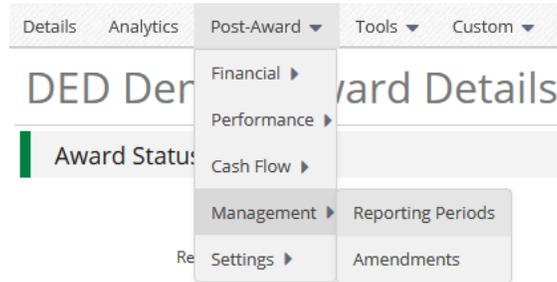
Create Reporting Period



After **Achievements** have been created, you are ready to create a Performance Reporting Period.

Reporting Periods can be accessed in two ways:

1. Activity (left navigation) > Reporting Periods
2. Award Screen > Post-Award (tab) > Management > Reporting Periods



Click the **+** icon (top right) to start a Reporting Period.



Select **Achievements**, the **Time Period** for the report, and click **Save**.

NOTE: This selected Time Period are the dates the achievements needs to be between (Achievement Date).

Reporting Periods

Which grant would you like this closeout to apply to?

DED Demo

What types of reporting periods would you like to include?

- Expenses
 Achievements

What period of time would you like to close?

Select a time period... ▼

Cancel

Save

If you need to edit this Reporting Period, click **Save** in the bottom right, go back to your Achievements and add/edit them, then come back to Reporting Periods. After selecting this open Reporting Period, it will automatically update as long as your edits were Achievements within this Reporting Period date range.

Number of Goals with No Achievements: This will show how many goals do not have an Achievement within this Reporting Period Date Range. It should be 0 unless you have milestone or narrative goals that you have marked as 'Complete' which you no longer need to enter additional Achievements.

Comments: *Optional. (Enter why you didn't enter Achievements on certain Goals)*

Attach Documentation: *Optional.*

Overall Achievements Details

Number of Goals with No Achievements: 1

Comments:

Attach Documentation:

Last Reporting Period I marked a milestone Achievement as 'Complete', so this Reporting Period I didn't add another Achievement to that Goal.

Achievements Analytics show how many achievements are associated for each goal during your Reporting Period (not the complete contract time period). If there is a 0, that means no achievement was entered during this Reporting Period (date range) for that Goal.

Achievements Analytics

Goal	Type	# of Achievements Period to Date
Example: Narrative	Narrative	1
Example: Numeric	Numeric Goal	1
Example: Milestone	Milestone	0
Example: Percent Achieved	Percentage Achieved	1
Example: Percentage Change	Percentage Change	1

List the 5 Goals on Performance Plan.

Here is the Goal that was marked 'Complete' last Reporting Period.

In the **Achievement Closeout** section, leave the 'Select All' selected. This is 'closing' out your achievements associating them to this Reporting Period. The achievements can no longer be edited after being 'closed'.

Achievements Closeout

Select All

Achievements Closeout

Select All

Select	Goal	Goal Type	Description	Last Achievement
<input checked="" type="checkbox"/>	Example: Narrative	Narrative	More information on the Narrative goal	10/31/2021
<input checked="" type="checkbox"/>	Example: Numeric	Numeric Goal	More information on the Numeric goal	11/01/2021
<input checked="" type="checkbox"/>	Example: Percent Achieved	Percentage Achieved	Increased to a desired percentage.	10/01/2021
<input checked="" type="checkbox"/>	Example: Percentage Change	Percentage Change	Going from a current percentage to a desired percentage.	09/27/2021

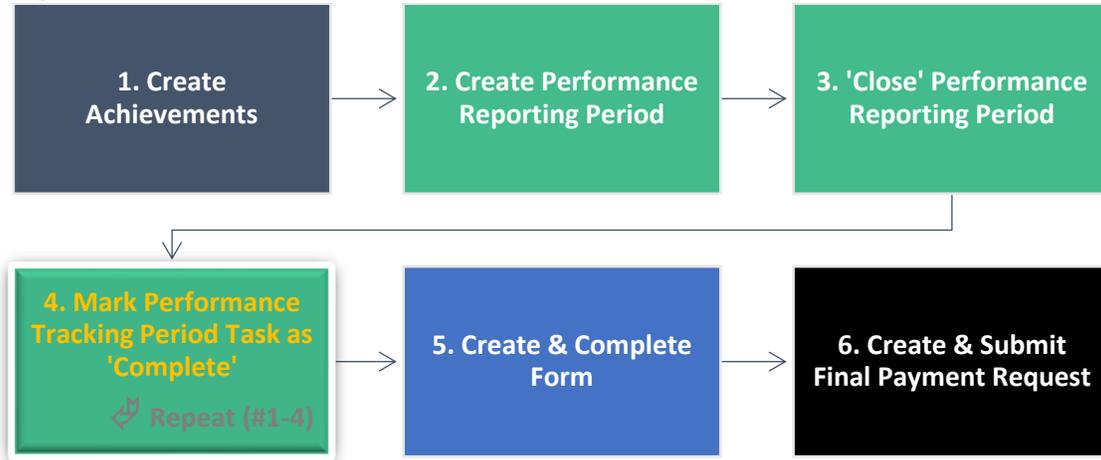
List the 4 Goals with Achievements.

If you are ready to submit to DED, click **Close** (Submit). If you are not ready to submit, click **Save**.

To see all Reporting Periods, go to: Award Screen > Post-Award > Management > Reporting Periods

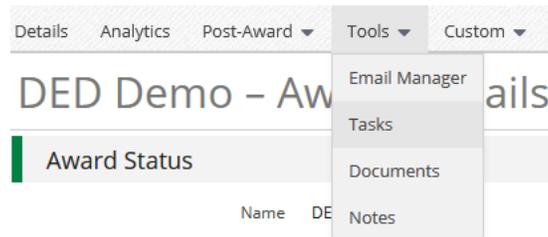
If you had a 'Saved' Reporting Period, this is where you would go to come back, click on it, and 'Close' it.
The Achievements in a 'Closed' Reporting Period cannot be edited.

Marking Tasks Complete



After completing your reporting now you can mark your Task as complete.

Login to AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Tools (tab) > Tasks



There are 3 ways to mark a Task as complete:

1. Select the specific Task and use the **Mark as Complete** checkmark icon under **Actions**.



2. Click the **Checkmark icon** on the Task row.



3. Click into the Task Name to see the description, and click the **Mark as Complete** checkmark icon in the top right corner.



After marking the Task as complete, the **Task Status** will be “Completed”.

Forms

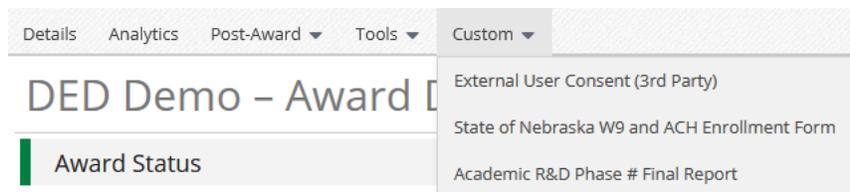


You will complete the following form at the end of your project based on your program:

- Academic R&D Phase I Final Report
- Academic R&D Phase II Final Report

To navigate to forms:

Login to AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Custom (tab) > [Select Form]



Click the **+** icon in the top right.



Complete the form.

When you are done, click **Create** in the bottom right.



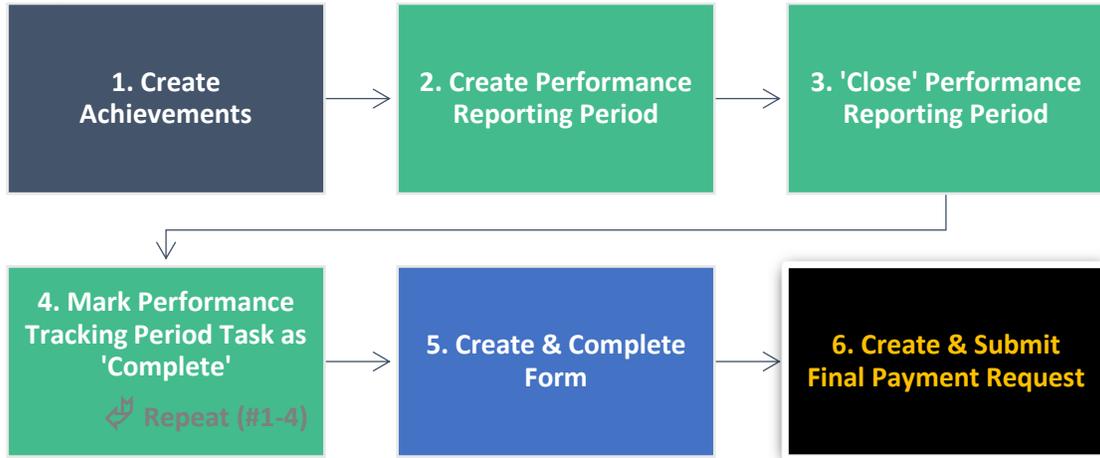
After creation if you need to edit the form, click the **Pencil icon** in the row of the form.



After your edits are made, click **Save** at the bottom right side of your screen.



Final Payment Request



After your final Performance Reporting Period and Form have been submitted, create and submit your final Payment Request using your normal Payment Request User Guide.